

[zurück](#) [Home](#) [weiter](#)

2.01.22 Action

The Action menu administers all actions concerning the contact person of the contact. An action can be datestamped and commented on from the agent/consultant. An action can also be marked if it has been completed. These actions can be analysed/charted in Contact Chart.

Tip: For more on this subject see chapter [4.1.04 Contact System](#)[4.1.04 Das Kontaktsystem](#).

Aktion	1.1-12	
Firmenname	CONSULT AG	[Icons]
Ansprechpartner	Nahl Lisa	[Icons]
Projektbezeichnung	CONSULT AG	41 Einführung Finanzbuchhaltung [Icons]
fällig bis	06.01.2009	11:00:00
Aktionstyp	Wiedervorlage	
Priorität	3 - normale Priorität	
Bearbeiter	Abel Klaus	[Icons]
Bemerkung	Nachfragen	
Abgeschlossen	☐	
Erzeuger	Schaub Peter	Anlagedatum 18.12.2008

The menu consists of the following elements:

- **Action:** The numeric field Action specifies Action distinctly.
- **Firm Name, Contact Person:** The alphanumeric field contact person specifies the contact person and the firm of the contact person.
- **Project Description:** This field specifies the project corresponding to the action.
- **Date Due:** The numeric field Date specifies the date of the action. The current date from the system is used as the default.
- **Action Type:** In the field Action Type the in Collections defined sales and marketing activities and actions or project actions of a business contact can be defined.
- **Priority:** This field specifies the significance of the action; for example to regulate/control the resubmission (Wiedervorlage) (actions, which are not yet completed).
- **Agent/Consultant:** An action can be assigned to the agent/consultant responsible. The agents/consultants are administered in the Employees menu.
- **Comments:** Comments concerning actions can be entered in this field.
- **Completed:** The action can be marked as processed/completed with this check box. Non-completed actions can always be displayed, if needed, in the contact overview. Unerledigte Aktionen können so im Rahmen der Kontaktübersicht auf Wunsch immer mit angezeigt werden.
- **Erzeuger(Employee, Set-up Date):** This field specifies the person who enters the action and the set-up date for the action. Diese Felder kennzeichnet den Erfasser und das Anlagedatum der Aktion.

From:
<https://infodesire.net/dokuwiki/> - **Projectile-Online-Handbuch**

Permanent link:
https://infodesire.net/dokuwiki/doku.php?id=en:handbuch:kapitel_2:2.01.22_basic_-_aktion&rev=1251207665



Last update: **2019/10/25 14:09**